

moray offshore renewables ltd

Environmental Statement

Technical Appendix 1.4 D - Results of Opinion Survey

Telford, Stevenson, MacColl Wind Farms
and associated Transmission Infrastructure
Environmental Statement



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1. Summary Findings

- **86 per cent of those surveyed support the development of wind energy in the outer Moray Firth. Only 6 per cent oppose development.**
- **78 per cent of those surveyed believe the project will have a positive effect on the environment overall.**
- **86 per cent of those surveyed expect the project to have a positive effect on the local economy.**
- **The most significant issue of concern was effects on marine mammals; although this was the largest area for concern, only 29 per cent though the project would have a negative effect.**
- **17 per cent of those surveyed believed the project would have a negative effect on landscape, seascape and views**

2. Methodology

A simple opinion survey questionnaire was used to undertake an initial assessment of public attitudes towards the project. Questions were framed to include an assessment of the most likely public concerns about the project, and an opportunity was provided for additional issue identification. Questionnaires were issued by project staff at public exhibitions during August and September of 2010, and November and December 2011.

The following questions were asked:

1. Do you believe that we require to reduce greenhouse gas production by switching to low-carbon energy?
2. Do you support the development of wind energy on land?
3. Do you support the development of wind energy in the seas around Scotland's coast?
4. Do you support the development of offshore wind in the outer Moray Firth?

Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on:

- 5.1 Jobs and the local economy
- 5.2 Tourism
- 5.3 Fishing
- 5.4 Birds
- 5.5 Marine mammals (dolphins, Seals, etc)
- 5.6 Landscape/seascape /views
- 5.7 Greenhouse Gas production

Responses were on a 1 – 5 scale, with 1 being strongly agree/ strongly positive, through to 5 being strongly disagree/strongly negative.

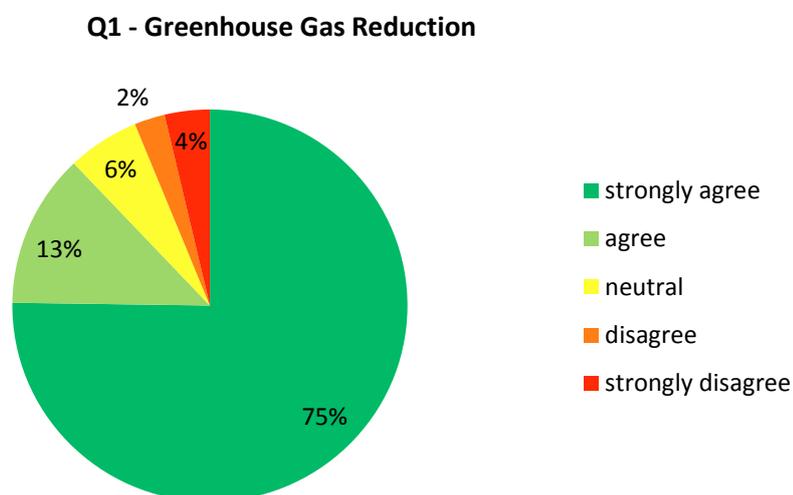
3. Response Rate

As discussed, personal contact and one-to one discussions were undertaken with ca. 1000 people, all of whom had the opportunity to fill in a questionnaire and return it directly to the project staff, or to return it via freepost to the MORL project office.

328 completed survey forms were received.

4. Analysis of Opinion Response

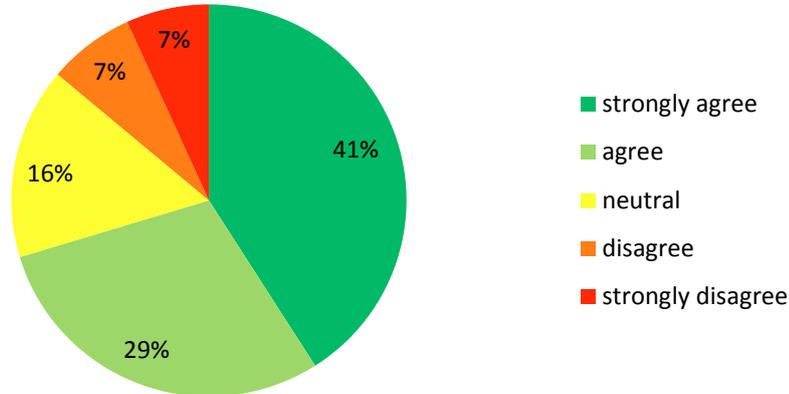
QUESTION 1 Do you believe that we require to reduce greenhouse gas production by switching to low-carbon energy?



This question indicates strong overall support for switching to low carbon generation, with 88 per cent of respondents agreeing that greenhouse gas reduction was desirable.

Question 2. Do you support the development of wind energy on land?

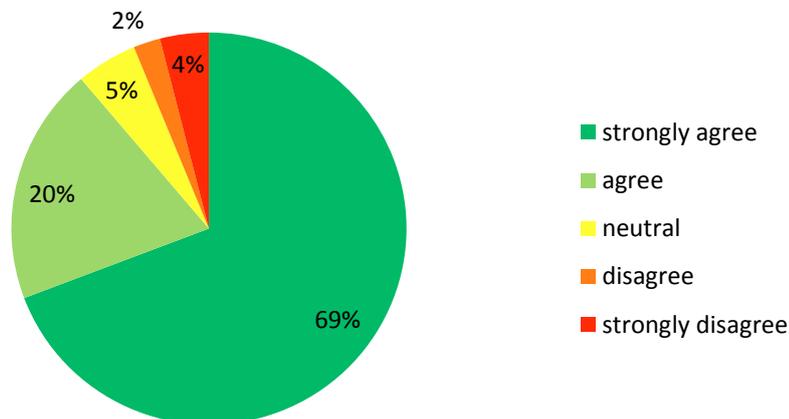
Q2 . Onshore Wind



This question tested support for onshore wind development in general; indications are 70 per cent in support, 14 per cent against.

Question 3. Do you support the development of wind energy in the seas around Scotland's coast?

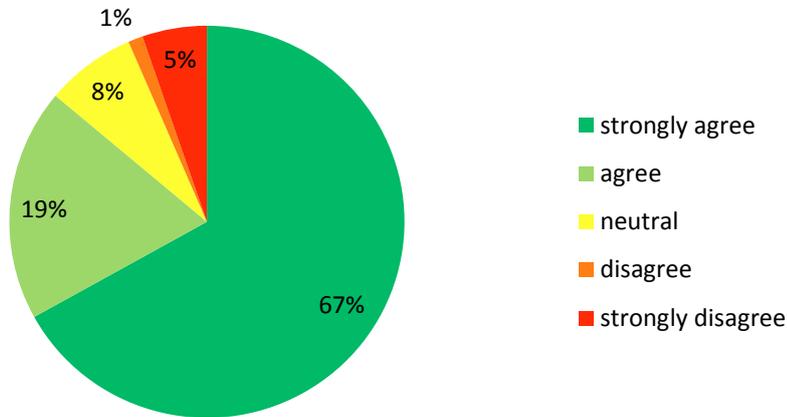
Q3. Offshore Wind



This question tested opinion towards offshore wind development in general; 89 per cent were in support, almost 20 per cent higher than the figure for onshore. Strength of support is also greater for offshore (69 per cent strongly supportive compared with 42 per cent for onshore), and opposition lower (6 per cent compared with 14 per cent).

Question 4. Do you support the development of offshore wind energy in the Outer Moray Firth?

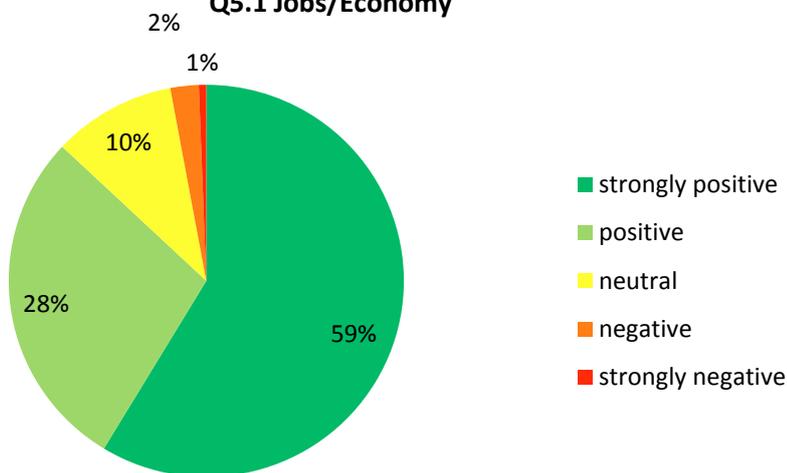
Q4. Moray Firth Project



This project tested opinion specifically towards the MORL project. 86 per cent of those surveyed were supportive of the project.

Question 5.1 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on jobs/the economy?

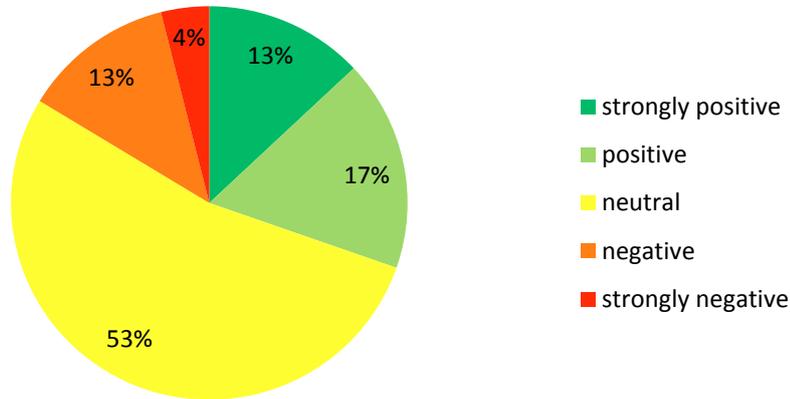
Q5.1 Jobs/Economy



There is an expectation that the project will have a positive effect on the local economy, with 87 per cent of respondents believing it will have a positive impact.

Question 5.2 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on tourism?

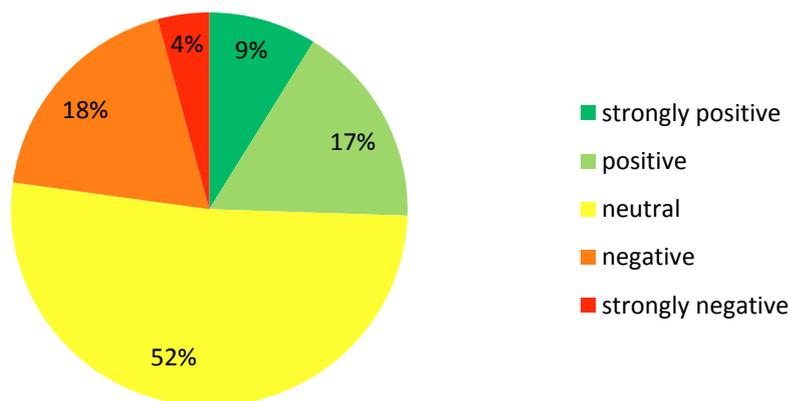
Q5.2 Tourism



Those questioned did not generally believe that the project would have an impact on tourism (53 per cent). Those who saw the project as an opportunity (30 per cent) outnumbered those who saw it as a disadvantage (17 per cent)

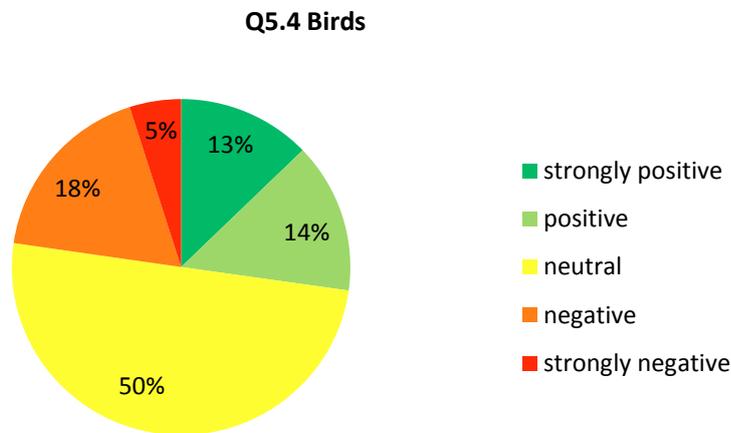
Question 5.3 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on fishing?

Q5.3 Fishing



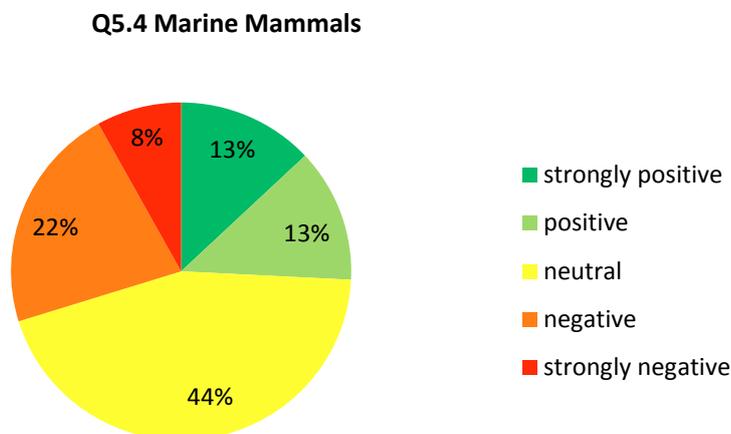
Within the general population, around half of those sampled did not believe that the project would impact on fishing; almost as many thought it would have a negative impact as the 26 per cent who thought it would have a positive impact

Question 5.4 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on birds?



Conventionally, concern about impact on birds is one of the most frequently raised ecological concerns about windfarms onshore, however 50 per cent believe the impact in this project will be neutral,

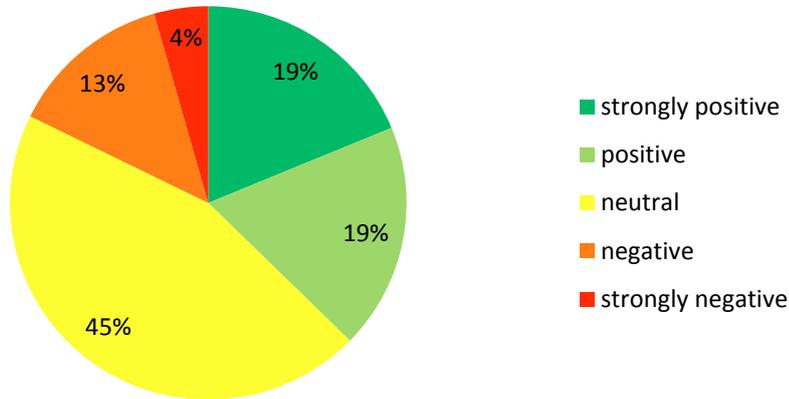
Question 5.5 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on marine mammals (seals, dolphins, etc)?



The most significant concern expressed in the survey is about the project's impact on marine mammals, reflecting the high profile which dolphins have in the Moray Firth. 30 per cent of those questioned believed the project would have a negative impact,

Question 5.6 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on landscape, Seascape, views?

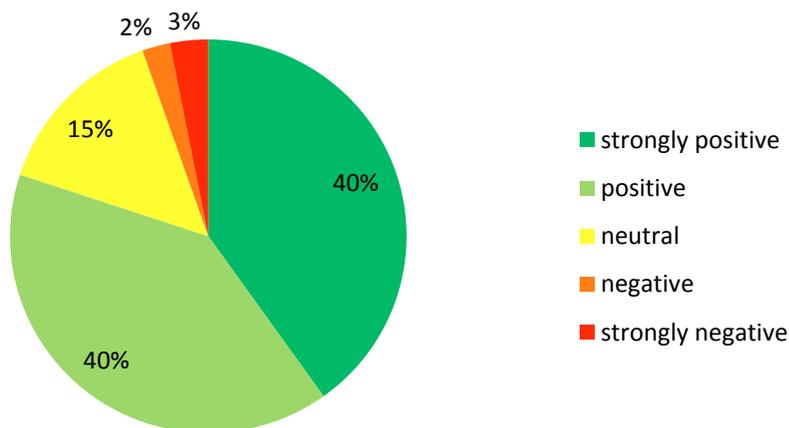
Q5.6 Landscape/Views



Public opinion appears that expected impact on landscape/seascape and views will be neutral; 38 per cent of those expressing an opinion believe that the effect will be positive, and 17 per cent believed it would be negative.

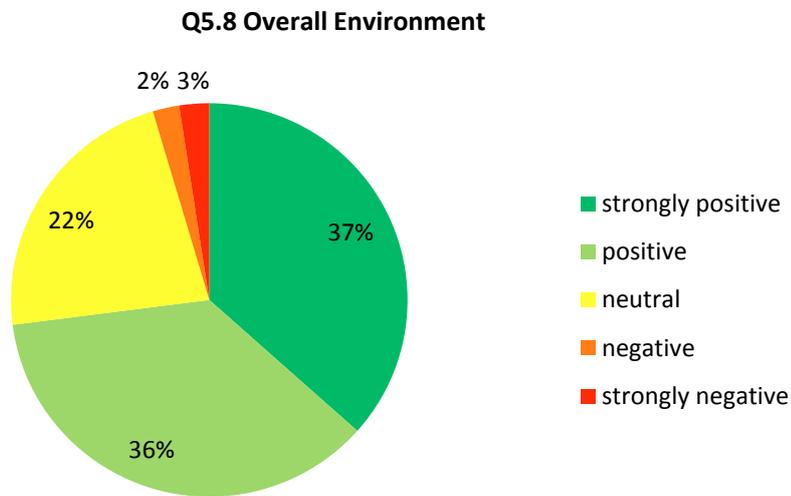
Question 5.7 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on greenhouse gas production?

Q5.7 Greenhouse Gas Production



80 per cent of those surveyed believe that this project will have a positive effect on contributing towards the reduction of greenhouse gases.

Question 5.8 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on the overall environment?



Public perception of the overall environmental impact of the project is good, with some 74 per cent of those surveyed believing that the project will have a positive effect on the overall environment, and only 5 per cent suggesting that the project will have a negative impact.

moray offshore renewables ltd

Developing Wind Energy In The Outer Moray Firth

FREEPOST
MORAY OFFSHORE RENEWABLES LTD
EDPR UK
40 Princes St
EDINBURGH

Fold here

moray offshore renewables ltd

In 2009 Moray Offshore Renewables Limited was formed as a joint venture company owned 75 per cent by EDP Renewables UK (EDPR) and 25 per cent by Sea Energy Renewables Moray Firth Limited.

EDPR is currently the world's third largest wind energy company, with more than 6GW of installed wind generation capacity across 8 nations, including Spain, Portugal, Poland Brazil and the USA. SeaEnergy Renewables Ltd provides unrivalled offshore development and deployment

experience gained through years of successful large-scale offshore project development in the oil and gas industry; more recently its key personnel pioneered the successful Beatrice offshore wind demonstrator project in the Moray Firth.

Together we bring a strong and clear commitment to renewable energy developments, with unique deep water capabilities and a proven track record for delivery and operating at scale.



Developing Wind Energy In The Outer Moray Firth

To reduce harmful greenhouse gas emissions and increase the amount of energy generated from renewable sources, Moray Offshore Renewables Ltd propose to use deep water engineering expertise from the North Sea to develop wind energy in the outer Moray Firth.

By working in deeper waters, we can undertake development some 25km distant from shore and take advantage of an excellent wind resource.

In January 2010, Moray Offshore Renewables Ltd was awarded exclusive rights to work with The Crown Estate to develop offshore wind generation in Zone 1 of their Round 3 Offshore Windfarm Leasing Programme.



The project will be developed in two phases, the first of which will be in the Eastern Development Area, and will be capable of delivering upwards of 1000MW of power. This is equivalent to the capacity of conventional thermal powerstation, and will represent a major opportunity to reduce greenhouse gas emissions.

- Approximately 200 turbines
- 1000MW – 1140 MW Generating Capacity
- Water depth 30m- 60m

Your Views?

In 2012, we intend to apply to the Scottish Government for consent to develop this project, as part of that process, we would like to find out your views on our proposals.

(1 strongly support –
5 strongly oppose.
Circle chosen)

- 1 Do you believe that we require to reduce greenhouse gas production by switching to low-carbon energy? 1 2 3 4 5
- 2 Do you support the development of wind energy on land? 1 2 3 4 5
- 3 Do you support the development of wind energy in the seas around Scotland's coast? 1 2 3 4 5
- 4 Do you support the development of offshore wind in the outer Moray Firth? 1 2 3 4 5

- 5 Do you believe that the development of wind energy in the outer Moray Firth will have a positive or negative effect on:

Jobs and the local economy	1	2	3	4	5
Tourism	1	2	3	4	5
Fishing	1	2	3	4	5
Birds	1	2	3	4	5
Marine mammals (dolphins, seals, etc)	1	2	3	4	5
Landscape/seascape /views	1	2	3	4	5
Greenhouse Gas production	1	2	3	4	5
Overall Environment	1	2	3	4	5

Other Comments:

If you wish to leave contact details so we can update you with project news:

Name

Address

email

Please cut, fold and return this questionnaire using the freepost service provided

